

Webinar Day 5: Topic Review and Demos

June 6, 2104



Goals for Today

- Review topics covered this week
- Demo based on incoming questions
 - ✓ Searching for a contract
 - ✓ Searching for a vendor
 - ✓ Registering as a vendor
- System Fixes/Updates
- Other Q&A
- Departmental Contract/Vendor Readiness Toolkit
- Next Steps



Topics Covered This Week

Review of Key Concepts

Webinar 1 – Readiness Program

Multi-pronged program including:

- Secretariat Workshops and dedicated Department Outreach teams
- Additional drop-ins and general overview sessions
- Ongoing training program
- Online webcasts and job aids
- Email blasts from OSD to vendors to encourage registration

Webinar 2 - Vendor Registration

- All vendors doing business with Executive Departments need to register in COMMBUYS, even if they were registered in Comm-PASS
- Job aids, webcasts and Help Desk available to support vendor registration
- Sample letter to vendors included in the Departmental Contract/Vendor Readiness Toolkit
- Vendors need to be registered in order for Departments to link them to their contracts

Webinar 3 – Contracts

- All Departmental contracts need to be activated in COMMBUYS in one of 2 ways:
 - ✓ Converted to a Master Blanket PO from migrated data
 - ✓ Created as a new Master Blanket PO in COMMBUYS
- Vendors need to be linked to the Master Blanket PO during the set-up process

Webinar 4 – Catalogs

- Contracts need to have an associated catalog to enable purchasing
- Outreach Teams will work with Departments on selecting catalog types to assign and catalog to create
- Departments should bring a selection of contracts to their workshops to work through this process

COMMBUYS

Terminology

COMM-Pass Term	COMMBUYS Term
Solicitations (all types)	Bid
Responses (all types)	Quote
Contracts (SWC & Departmental)	Blanket Purchase Order
	Open Market Purchase Orders
My Desktop	The Control Center

Master Blanket Purchase Orders

What They Are:

- Master Blanket Purchase Orders (POs) capture term contract agreements and allow for the processing of purchases (Release Requisitions) against them for the life of the contract
- Departmental contracts will become Master Blanket POs in COMMBUYS

Demo

Searching for Contracts

Searching for Contracts Demonstration

- ✓ www.commbuys.com
- ✓ Enter Login Credentials
- ✓ Search capabilities without Logging In





Vendor Registration Process Checklist



If the vendor has the following information on hand the registration process will be much easier.

- ✓ Tax ID
- ✓ Business Legal name, address, contact information
- ✓ Registering in the Small Business Purchasing Program
(See questions on [Mass.gov/sbpp](https://www.mass.gov/sbpp))

Vendor Registration Process Checklist

Category/ Program related questions:

- ✓ DUNS number (if applicable)
- ✓ MA Certified Minority Owned Business
- ✓ Interested in Partnering with other businesses
- ✓ Federally certified Service Disabled Veteran Owned Business Enterprise
- ✓ Type of Business Structure
- ✓ Profit/ Non-profit
- ✓ MA Certified Woman Owned business

Registering as a Vendor

Vendors register themselves in COMMBUYS!

- ✓ www.commbuys.com / Click “Register”
- ✓ Click “Registered Vendor Search”
- ✓ Sequential & step-by-step with business information requests
- ✓ All Vendor Profiles can be edited

Vendors need to be registered in COMMBUYS in order for Departmental contract enablement to be completed.



Demo

Searching for Vendors

Searching for Vendors Demonstration

- ✓ www.commbuys.com /
- ✓ Enter Login Credentials
- ✓ Search Capability without Logging in



Other Questions

Q: What is the status of statewide contracts being activated in COMMBUYS?

A: All Statewide Contracts have been activated in COMMBUYS and you can find them by searching for them. Remember, when searching you can put the familiar contract code from Comm-PASS in the “contract description” field to locate Statewide Contracts.

Q: Do Vendors need to specify UNSPSC codes when registering?

A: Yes; Vendors will be asked to specify UNSPSC codes during registration. The recommendation is that they specify as many as seem relevant. Vendors can change and update their UNSPSC codes as often as needed.

- *Vendors should select and subscribe to all commodity codes which are related to the goods/services they are able to provide. Even if a commodity code seems only slightly related to a product or service offered by the company, the Vendor should select it in order to receive the email alerts, read through the opportunities and decide if it is an opportunity you wish to pursue. A Seller Administrator can add and remove codes at any time.*

Q: How do grants work in COMMBUYS?

A: The grant process that was followed in Comm-PASS is in the process of being revised by OSD in collaboration with the State Comptroller’s Office. Guidance will be forthcoming.

Recent System Fixes/Updates

Topic Area	Issue Description	Issue Resolution
Bid Approval	A state agency Purchaser experienced an error while attempting to approve a bid that had been cloned from a previous bid.	Attachment management system configuration changed. No impact to data integrity.
Bid Award for Bids Migrated from Comm-PASS	Purchasers are unable to award a migrated bid from Comm-PASS because the bid is in "Evaluated" status, not "Open" status.	Data fix developed and will be applied to migrated bids that have been found to have this issue. Issue is related to data migration, not general system functioning.
Bid Location	Purchasers are experiencing a problem in which their Bids lose their location whenever a Bid Amendment is created for the Bid.	Changes implemented to preserve the Location that was stored on the Bid before saving.
Vendor Bid Response Issues	Vendors are experiencing errors when trying to add an attachment / upload a document (file) to a bid Response (quote).	Advise vendors to delete attachment. Rename with a name that does not include any trailing spaces in the file name. An enhancement is being put into COMMBUYS to remove trailing spaces from the end of a file name during the upload process.
Open Bid and Award to Selected Vendors	User received an error message when trying to open a migrated bid with a status of Bid to PO and award to the winning bidders.	The COMMBUYS team is populating the Blanket Begin Date and Blanket End Date with the date "1/1/9999" so that the bid can be awarded and the PO opened. This fix will be run for both the bids migrated and any resulting POs. Buyers need to go into the PO and change the Blanket Begin Date and Blanket End Date on the Control Tab to set them to the correct dates.

Toolkit includes:

- Sample letter about registration for Departments to send to their vendors
- Two new Job Aids to support contract set-up:
 - ✓ Converting migrated data to a Master Blanket PO
 - ✓ Creating a Master Blanket PO from scratch
- Links to existing webcasts, including:
 - ✓ Seller Registration
 - ✓ Using UNSPSC Codes
- Links to other existing webcasts, job aids and the training schedule

Toolkit is available here:

<http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/osd-events-and-training/commbuys-readiness-training.html>.

Review of Readiness Program

Week of 6/2

Week of 6/9

Week of 6/16

Week of 6/23

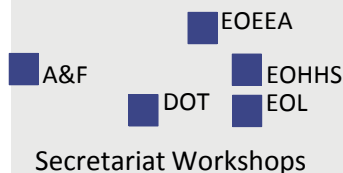
Agency Intensive Readiness Program



Daily Orientation Webinars



Overview of Buying in COMMBUYS Open Session



Secretariat Workshops



Overview of Buying in COMMBUYS Open Session



Agency Outreach Meetings



Ongoing Training

Purchasing from Catalogs



Conducting Procurements



Purchaser Drop-In Sessions



Vendor Training



'Searching in COMMBUYS' webinars



Agency Intensive Readiness Program

Secretariat Workshop

Secretariat workshops are scheduled for the next week and a half.

Administration & Finance (16 departments)	Monday, June 9 – 9 am – noon
Education (5 departments)	Monday, June 16 – 1-4 pm
Energy & Environmental Affairs (8 departments)	Thursday, June 12 – 1-4 pm
Health & Human Services (15 departments)	Friday, June 13 – 9-noon
Housing & Economic Development (10 departments)	Tuesday, June 17- 1-4 pm
Labor & Workforce Development (7 departments)	Friday, June 13 – 1-4 pm
Public Safety & Security (12 departments)	Monday, June 16 – 9-noon
Transportation (5 departments)	Wednesday, June 11 – 1-4 pm

Outreach team members also will work with agencies to schedule follow-up meetings onsite at agency locations.

Next Steps

Start to take action:

- Create and prioritize an inventory for your Departmental contracts
 - ✓ Contracts migrated to COMMBUYS
 - ✓ Contract that need to be created as Master Blanket POs from scratch
- Plan who should attend your Secretariat workshop and what priority topics you would like to discuss
- Decide what contracts to bring to your Secretariat workshop to work through the transition to COMMBUYS
- Have Organization Administrators determine the additional support they might need with ongoing set-up of approval paths and user roles
- Review the Department Contract/Vendor Readiness Toolkit available here:
<http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/osd-events-and-training/commbuys-readiness-training.html>.

Workshop Breakout Sessions

1. Organization set up – departments, locations, bill to/ship to, users, roles and approval paths
2. Contract Management – finding and adding vendors, vendor registration, contract level UNSPSC review, types of contracts (Statewide, departmental, and limited user) and solicitations
3. Catalog creation and vendor registration
4. Purchasing from contracts, searching for goods, how to find converted contracts/data

Webcasts

- [Overview of COMMBUYS](#)
- [Basic COMMBUYS Navigation](#)
- [Searching for Contracts in COMMBUYS](#)
- [Purchasing from Statewide Contracts in COMMBUYS](#)
- [Approving Documents in COMMBUYS](#)



Job Aids

- [COMMBUYS Requisitions](#)
- [COMMBUYS Purchase Orders](#)



I Buy from Contracts

Training Classes

- [Procurement in COMMBUYS: Creating Posting & Managing](#)



Webcasts

- [Overview of COMMBUYS](#)
- [Approving Documents in COMMBUYS](#)



Job Aids

- [COMMBUYS Bids](#)



I Prepare Bids



Training Classes

- [Organization Set-Up and Maintenance](#)



I Administer My Organization



Job Aids

- [How to Maintain Organizations in COMMBUYS](#)
- [How to Set Up Approval Paths](#)
- [How to Maintain Agency Users](#)
- [More topics..](#)



Webcasts

- [Overview of COMMBUYS](#)



I'm a Vendor



Jobs Aids

- [Vendor Registration](#)
- [Create a Quote](#)
- [Access Purchase Orders & Change Orders](#)

Training

- [Locate and Respond to Bids](#)



Webcasts

- [Overview of COMMBUYS](#)
- [Vendor Registration in COMMBUYS](#)
- [How to Find Bids and Submit Quotes in COMMBUYS](#)
- [How to Find Your Purchase Orders in COMMBUYS](#)

COMMBUYS Community Resource Map



Readiness Resource Center



[COMMBUYS Readiness Center](#)

[COMMBUYS KEY Resources](#)

Questions



We're here to help!

Questions? You can reach the COMMBUYS Help Desk by phone (1-888-627-8283) and by email (commbuys@state.ma.us).

More Information?

For Readiness Program resources: Please visit www.mass.gov/osd, click “OSD Events and Training” on the left of the page and then select “COMMBUYS Readiness Training.” Or navigate directly by following this link: <http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/osd-events-and-training/commbuys-readiness-training.html>.

For additional information, such as Glossary of Terms, Terminology Crosswalk, policy documents and previously published job aids and webcasts, visit www.mass.gov/osd/commbuys and click “Key Resources” on the left of the page.